

SERVICES & PRICING GUIDE

Mountainview Accounting & Finance Solutions LLC



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CONTENTS

- Welcome Page
- Introduction
- Package Details
- Signature Service
- Package Option
- Add On's
- Additional Service
- How It Works
- Four Step Process
- Next Step
- Testimonials
- FAQ's
- Ready to get started

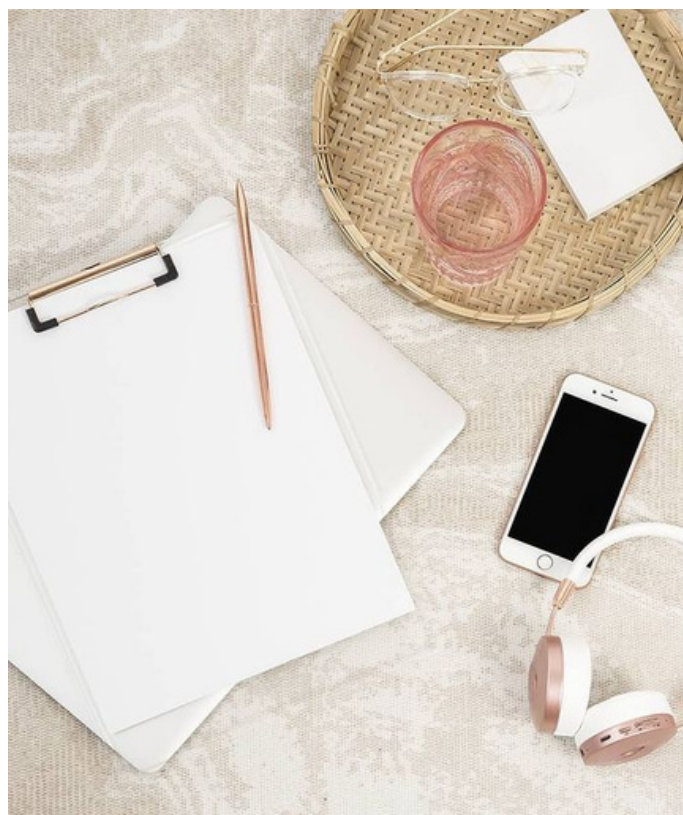


Welcome!

At Mountainview Accounting & Finance Solutions LLC, we believe that managing your finances effectively is the cornerstone of business success.

In this guide, you'll find detailed information on our services, pricing, and how we can work together to ensure your financial success.

Together, we'll elevate your finances to new heights, unlocking the potential for success that your business deserves. Thank you for considering us as your trusted bookkeeping partner.



HELLO! I'M LANE



I'm a professional
Accountant with MBA in Technology
and Finance

I'm passionate about helping small
business owners with their accounting and
bookkeeping. Thank you for considering
me as your partner in financial
management.

My mission is to provide comprehensive, reliable, and personalized
bookkeeping and accounting services that empower businesses to focus on
their core activities while maintaining financial clarity and compliance.

Through our services, we aim to ensure accuracy in financial records, provide
insightful financial reporting, and support strategic business decisions.

connect with me



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PACKAGE DETAILS

All packages are customizable based on your specific business needs, and additional services can be added for a tailored bookkeeping solution.

PACKAGE (A) \$500 MONTHLY

- ☐ Monthly Bookkeeping
- ☐ Bank & Credit Card Reconciliation (Up to 5 accounts)
- ☐ Financial Statements
- ☐ Quarterly Financial Review
- ☐ Dedicated Bookkeeper

PACKAGE (B) \$1,000 MONTHLY

- ☐ All services in the Package (A)
- ☐ Accounts Payable & Receivable Management (Up to 100 transactions)
- ☐ Payroll Processing & Management (up to 20 employees)
- ☐ Custom Financial Reporting
- ☐ Monthly Financial Review

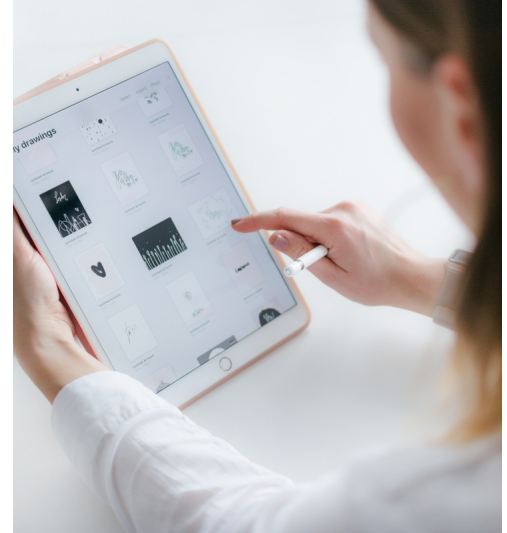
Need more support?

Both packages are customizable based on your specific business needs, and additional services can be added for a tailored bookkeeping solution.

SIGNATURE SERVICE

Choosing our Elite Financial Management Package means partnering with a team that is as invested in your business's success as you are.

You'll have everything you need to make informed financial decisions, optimize your operations, and accelerate your business growth.



What you'll get:

- ✓ All services in the Package (A) & (B)
- ✓ Detailed analysis and forecasting of your cash flow, enabling proactive financial management and planning for future growth.
- ✓ Strategic financial advice and consulting, offering insights into financial planning, budgeting, risk management, and investment opportunities.
- ✓ Tax services, including preparation, filing, and strategic planning to minimize liabilities and maximize returns

INVESTMENT
STARTS AT **\$1,500**



SIGNATURE SERVICE

THE DETAILS

Choosing our Elite Financial Management Package means partnering with a team that is as invested in your business's success as you are.

- This is perfect for you if

- ✓ You need deep insights into your financial health
- ✓ You need priority high touch client experience
- ✓ You need personalized tax services and tax strategic planning
- ✓ You need help navigating complex financial decisions.

- How It Works

With our comprehensive suite of services, expert advice, and personalized support, you'll have everything you need to make informed financial decisions, optimize your operations, and accelerate your business growth.

Elevate your financial management today with our Elite Package and focus on what you do best—running your business.

Includes:

- Financial Analysis,
- Cash Flow Management,
- Budget & Risk Management,
- Priority Support
- Tax Services & Tax Planning

INVESTMENT
STARTS AT

\$1,500

PACKAGE OPTION

	BRONZE \$500 MONTHLY	DIAMOND \$1,500 MONTHLY	GOLD \$1,000 MONTHLY
Monthly Bookkeeping	✓	✓	✓
Bank Reconciliation	✓	✓	✓
Financial Review	✓	✓	✓
Financial Statement	✓	✓	✓
AR & AP Management	✗	✓	✓
Payroll Management	✗	✓	✓
Priority Support	✗	✓	✓
Financial Analysis	✗	✓	✗
Cash Flow Management	✗	✓	✗
Tax Services & Planning	✗	✓	✗
	LEARN MORE	LEARN MORE	LEARN MORE

All packages are customizable based on your specific business needs, and additional services can be added for a tailored bookkeeping solution.

ADDITIONAL SERVICE

Software Setup and Training - \$125/hr

Assistance with the selection, setup, and training for bookkeeping and financial software

Includes:

- *Software Set up*
- *Software Training*
- *Software Coaching*
- *Software Optimization*
- *Charged Hourly*

[LEARN MORE](#)

Fixed Asset Management - \$350

Tracking and management of fixed assets, including depreciation schedules and end-of-year tax adjustments.

Includes:

- *Fixed Assets Tracking*
- *Fixed Assets Management*
- *Depreciation Schedules*
- *Amortization Schedules*
- *End-of-Year Adjustments*

[LEARN MORE](#)

Accounts Cleanup and Catch-up - Call for Quote

A one-time service to update and correct bookkeeping records. Ideal for businesses that need to get their books up to date.

Includes:

- *Comprehensive Review*
- *Categorization*
- *Reconciliation*
- *Adjustment Entries*
- *Financial Statements*
- *One-time Service*

[LEARN MORE](#)

To enhance the value and comprehensiveness of our bookkeeping packages, consider the following add-on services. These options allow you to customize the packages based on your specific needs, providing a more tailored and flexible approach.

HOW IT WORKS

This is our four-step process to onboard a new client, ensuring a smooth transition and setting the stage for a successful partnership

01

Initial Consultation and Assessment

We begin with an introductory meeting to get to know each other, understand your business model, and discuss your specific bookkeeping and financial management needs. This step involves a detailed assessment of your current financial systems, bookkeeping practices, and any challenges you're facing.

02

Proposal and Agreement

We provide a detailed proposal outlining the scope of services, deliverables, timelines, and pricing tailored to your business requirements. We discuss the proposal with you to ensure it meets your expectations and make any necessary adjustments.

03

Onboarding

Once the proposal is finalized, we sign a service agreement that outlines the terms of our engagement, and confidentiality. We provide an overview of our bookkeeping processes, including how and when financial reports will be delivered, communication protocols, and how to submit documents and information to us.

04

Ongoing Support and Communication

Following the onboarding, we establish regular check-ins to discuss your financials, any concerns, and adjustments to services as your business evolves. Our team remains available for any questions or additional support needed, ensuring a seamless and supportive partnership.

FAQ's

Category/Topic

What kind of businesses do you serve?

We specialize in providing bookkeeping and accounting services for small and mid size businesses.

How do you ensure the confidentiality of our financial data?

Protecting your financial data is our top priority. We employ secure cloud-based accounting software to safeguard your information.

Can you work with our existing accounting software?

We can seamlessly integrate with your existing system or recommend and help transition you to a system that better suits your needs.

Category/Topic

Do you provide tax filing services?

While our primary focus is accounting and bookkeeping, we work closely with your tax professional to ensure that your business complies with tax laws.

How often will we communicate about my financials?

We offer quarterly or on-demand meetings to discuss your financials, strategies, and any concerns you might have.

How can I get started with your services?

Contact us to schedule an initial consultation. We'll discuss your business needs, assess your processes, and propose solution for you.



DON'T SIT DOWN AND WAIT FOR
THE OPPORTUNITIES TO COME.
GET UP AND MAKE THEM.

Madam C.J. Walker

What's Next?



Ready to get started?

Partner with us for hassle-free, accurate, and reliable bookkeeping services tailored to your unique needs. We are committed to ensuring your financial success through comprehensive bookkeeping solutions, from day-to-day accounting to strategic financial planning.

Don't let bookkeeping tasks distract you from what you do best.

Elevate your business with our expert bookkeeping services because when your finances thrive, so does your business

BOOK A CALL

Let us handle the numbers!

Ready to take the stress out of your finances and focus on growing your business? Partner with us for hassle-free, accurate, and reliable bookkeeping services tailored to your unique needs.

THANK YOU!



Connect with me



<https://mountainviewaccountingsolutions.org>



THANK YOU!

Connect with me



www.yourwebsitename.com